

Prospecting & lead capture

Every request captured, qualified and followed up without delay.

COMPANYMESH · NEW REQUESTS

Today's requests

6 new

NR

Comptoir Nerquais

Website form · 120 m² shop fit-out

Score 86

4 min ago

HP

Hôtel du Parc

Inbound call · 14-room renovation

Score 74

09:12

SK

Studio Mamoviaux

Trade fair · 40 m² office

Score 52

08:47

BL

Brasserie Valbréane

Referral · Terrace

To qualify

yesterday

CM

Cabinet Sorquelys

Email · Callback request

To qualify

yesterday



Request assigned

Comptoir Nerquais → Julie M.
Namur area · Retail

Notified

Every request captured, qualified and followed up without delay.

Website form, phone call, trade fair, referral: requests come in from everywhere and some get lost. The Prospecting module centralises every new contact, enriches it, qualifies it and hands it to the right person. You reply faster and you know where your best customers come from.

No lost requests

Every source lands in the same queue.

A fast response

Automatic assignment and an instant alert to the right sales rep.

Measured sources

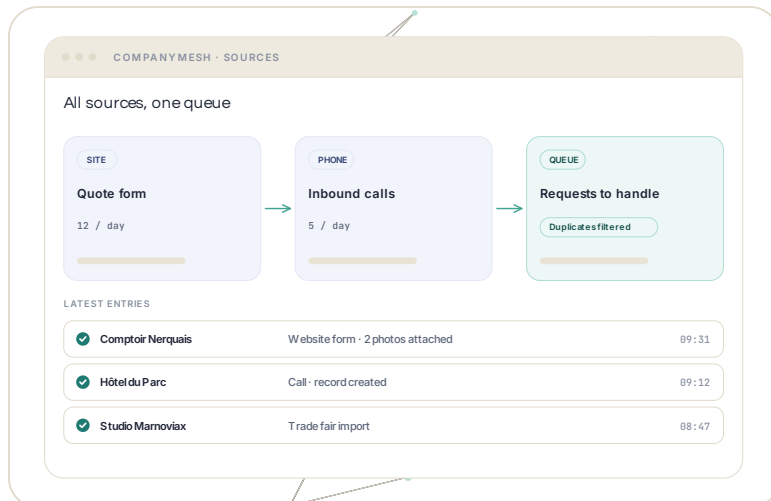
You know which channels really pay off.

A polished first contact

Personalised pages and links for every prospect.

In this module

- 1 One queue for every request
- 2 Forms that qualify
- 3 Qualification and scoring
- 4 Automatic assignment
- 5 Personalised links and pages
- 6 Source measurement



1 One queue for every request

Website, phone, trade fair: it all lands here.

Every incoming request automatically creates a prospect record, whatever its source: website form, email, call, trade-fair import, partner API. Duplicates are recognised and the source is recorded so you can measure your channels.

What it enables

- Intake from the website, email, API or an import
- Source and originating campaign kept
- Automatic de-duplication of requests
- Prospect attachments linked (plans, photos...)

2 Forms that qualify

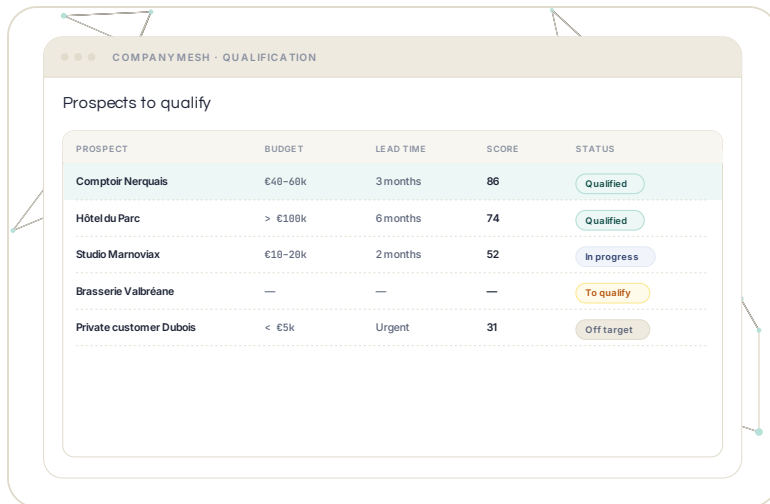
The right questions, from the very first click.

Forms are built in steps, with conditional questions: what comes next depends on previous answers. The answers feed straight into the prospect's record and score.

The screenshot shows the 'COMPANYMESH · FORM' interface for a 'Quote request · step 2 / 3'. The form is divided into two main sections: 'Project type' and 'LOGIC'. The 'Project type' section has three input fields: 'Full renovation', 'Approximate area' (120 m²), and 'Desired timeframe' (Before March 2027). Below these are two toggle switches: 'Show the budget question' and 'Ask for photos'. The 'LOGIC' section shows a flowchart with three conditions: 'If renovation' (→ question on current condition), 'If area > 100 m²' (→ score +15), and 'If lead time < 1 month' (→ high priority).

What it enables

- Multi-step, conditional forms
- Spam protection
- Fields adapted to your business
- Embeddable on any website



COMPANY MESH - QUALIFICATION

Prospects to qualify

PROSPECT	BUDGET	LEAD TIME	SCORE	STATUS
Comptoir Nerquais	€40-60k	3 months	86	Qualified
Hôtel du Parc	> €100k	6 months	74	Qualified
Studio Marnovix	€10-20k	2 months	52	In progress
Brasserie Valbréane	—	—	—	To qualify
Private customer Dubois	< €5k	Urgent	31	Off target

3 Qualification and scoring

Focus on the most promising requests.

Each prospect gets a qualification status and a score based on criteria you choose: budget, timeframe, area, project size, engagement. Ready prospects become opportunities in one click.

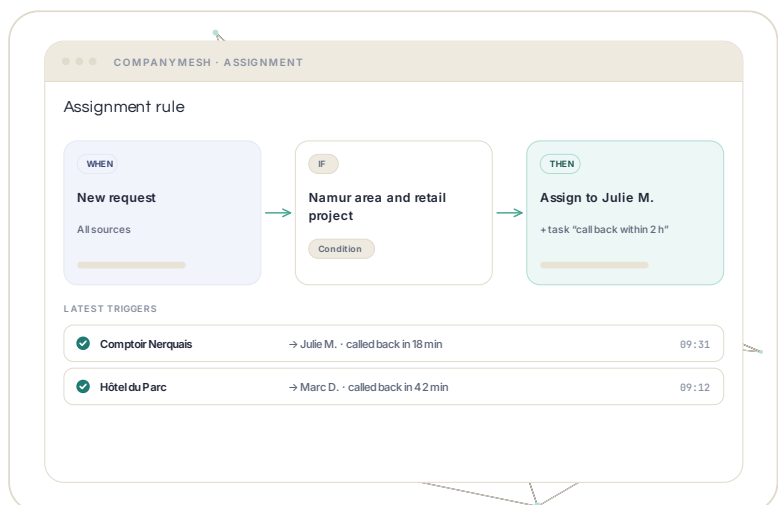
What it enables

- Custom qualification criteria
- Automatic scoring and prioritisation
- Conversion to an opportunity with all details carried over
- Loss reasons to analyse what you miss

4 Automatic assignment

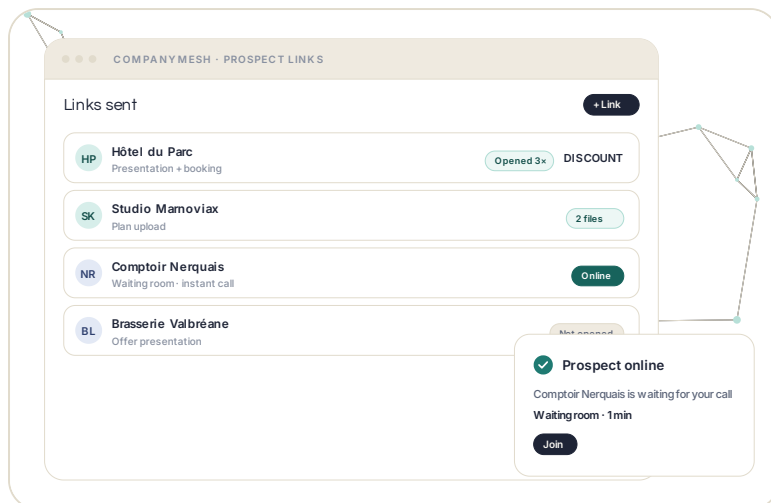
The right sales rep, notified straight away.

Rules distribute new requests by area, product, language or each rep's workload. The assigned person receives a notification and a first-contact task.



What it enables

- Rules by area, product, language or round robin
- Instant notification
- Time to first contact tracked
- Reassignment if a request goes unanswered



5 Personalised links and pages

A tailored first impression.

Send a prospect a personal link: offer presentation, appointment booking, document upload or a waiting room for an immediate call. You see when they open it.

What it enables

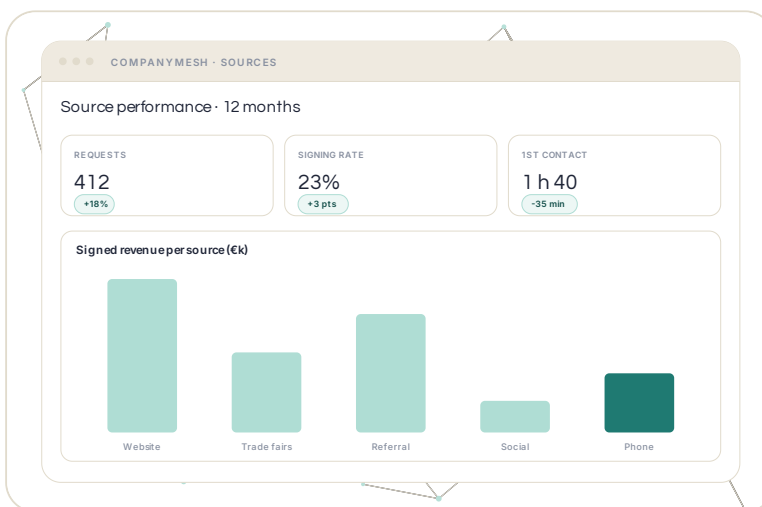
- Personalised prospect pages with an offer
- Secure file upload
- Built-in appointment booking
- Tracking of opens and actions

Example — After a trade fair, every visitor receives a link to book a 15-minute call.

6 Source measurement

Invest where it pays off.

A dashboard links each source to its results: number of requests, conversion rate, signed revenue. At last you know what your website, trade fairs and ads are really worth.



What it enables

- Requests and conversions by source
- Average response time
- Revenue generated per channel
- Period-over-period comparison

TAILORED

Adapted to your business

Your website form asks the questions that matter for **your** business: area, budget, timeframe, project type... Qualification criteria and assignment rules (by area, by product, by available sales rep) are defined with you during the workshops.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Websites & forms

WordPress

WooCommerce

Shopify

PrestaShop

Webflow

Advertising & social

Meta (Facebook / Instagram)

LinkedIn

Google Ads

Automation

Zapier

Make

n8n

Webhooks

Messaging

Microsoft 365

Gmail

WhatsApp Business

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`crm.contacts` Customers & contacts

`crm.pipeline` Pipeline & opportunities

`crm.agenda` Calendar & appointments

`crm.marketing` Marketing & campaigns

`auto.web` Connected website

`auto.api` API & connectors

Let's talk about your future tool

Tailored demo, by appointment.

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